

City of San Jose

Vacant Land Inventory, July 2005

Summary of Findings

Residential

The rate of absorption of vacant residential land within the San Jose Urban Service Area experienced a high degree of volatility over the past two decades, averaging about 320 acres/year but sometimes varied by as much as 50% to 100% or more in consecutive years. This volatility was attributed to rapid changes in the pace of construction of low-density, single-family detached homes (following the ups and downs of the local economy). This housing type historically comprised close to half of all new housing units.

The current availability of vacant residential land is approximately 1,090 acres. Approximately two-thirds of the vacant residential land is designated for single-family development, and are located primarily in either the Almaden, Alum Rock, Berryessa, or Evergreen planning areas (see Table 3). On the other hand, multi-family lands are more evenly distributed, with the greatest concentration (27%) occurring in the South planning area (in the Communications Hill Specific Plan area).

Given this limited vacant supply, the future rate of land absorption is expected to be much slower and more stable than in the past. In fact, the rate of residential land absorption during FY 04/05 was the slowest in the last 25 years (129.5 acres). However, slower land absorption will not necessarily translate into a reduced supply of new housing units. This is because development is now commonly occurring on already developed land (i.e., not vacant) and residential densities are increasing. Today, only about one-fifth of San Jose's new housing is made up of single-family detached units, with the large majority being higher-density apartments, condominiums, and townhomes.

Commercial

Absorption of vacant commercial land in San Jose has proceeded at a fairly slow, steady rate over the last twenty years, averaging about 35 acres/year. This pace is expected to slow even further as the available vacant land supply continues to diminish (now under 150 acres). In fact, the rate of commercial land absorption during FY 04/05 was also the slowest in the last 25 years (5.2 acres). The majority of the City's commercial lands were developed prior to 1975, while more recent activity has shifted towards the reuse of property with prior improvements. Visible examples of this reuse activity include new high-rise buildings on commercial parcels in the Downtown area and redevelopment or expansion of several regional shopping centers (e.g., Santana Row, Valley Fair, Oakridge, and Eastridge).

Industrial

The rate of absorption of vacant industrial land in San Jose has closely mirrored fluctuations in the local high tech industry over the last twenty years, ranging from 4 to 500 acres annually. This pattern is evidenced by industrial land absorption over the last four fiscal years, which has slowed due to the current economic slowdown. The fluctuation in absorption is expected to continue given that the demand for new industrial space will eventually return to Silicon Valley, at which time a significant amount of vacant industrial land (about 3,000 acres) is ready and available for development in San Jose. More than 40% of this vacant land lies in the North Coyote Valley (see attached map).

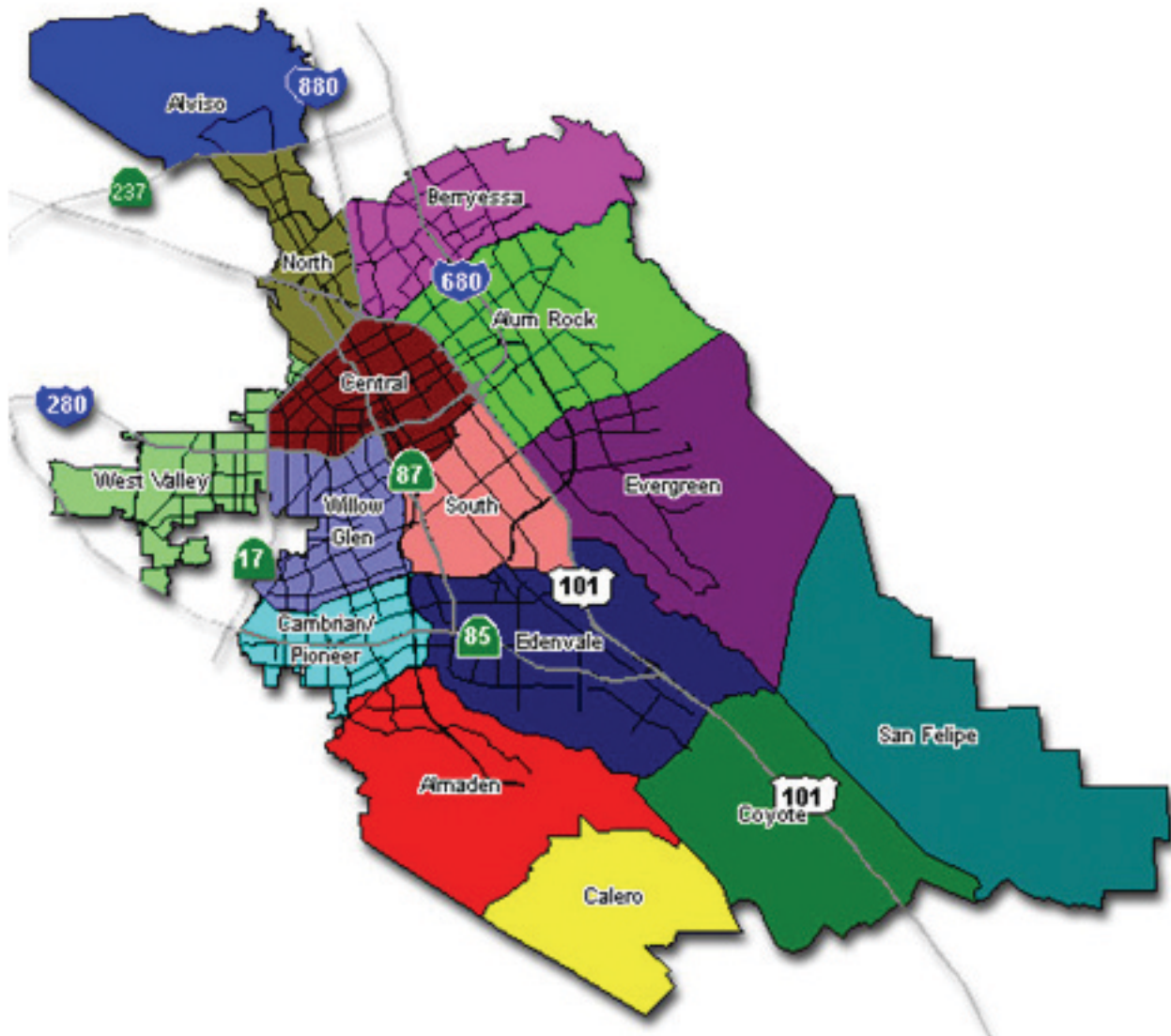


Table 1
Historical Vacant Land Absorption (in acres) by Land Use:
FY 80/81 to FY 04/05

Fiscal Year	Residential	Commercial	Industrial	Other	Total
80/81	490.0	72.2	327.4	174.1	1,063.7
81/82	149.9	38.2	208.6	59.6	456.2
82/83	181.4	60.9	243.9	85.6	571.7
83/84	502.0	28.5	500.4	684.3	1,715.1
84/85	497.6	59.6	265.6	130.7	953.4
85/86	454.5	44.9	75.6	77.3	652.4
86/87	396.4	50.4	115.2	190.0	752.0
87/88	267.1	41.4	62.6	149.2	520.3
88/89	365.8	32.2	81.4	109.8	589.1
89/90	187.0	48.0	129.3	104.3	468.6
90/91	240.7	29.8	95.0	106.9	472.5
91/92	190.4	13.4	82.2	249.1	535.1
92/93	223.6	17.2	52.1	328.1	620.9
93/94	232.1	47.6	77.3	156.3	513.4
94/95	209.4	31.8	128.0	47.1	416.3
95/96	393.9	34.4	136.7	131.0	695.9
96/97	451.1	61.5	124.3	120.2	757.1
97/98	630.3	30.3	263.8	147.0	1,071.4
98/99	533.6	27.9	235.7	114.9	912.2
99/00	444.0	30.8	103.2	120.9	698.8
00/01	234.1	27.6	198.5	7.2	467.4
01/02	180.2	33.1	52.7	0.8	266.8
02/03	203.1	10.8	4.4	248.2	466.5
03/04	264.6	6.8	56.5	239.7	567.6
04/05	129.5	5.2	17.5		152.2
Total	8,052.1	884.3	3,637.8	3,782.4	16,356.5
Average	322.1	35.4	145.5	157.6	654.3

Figure 1:
Historical Vacant Land Absorption by Land Use:
FY 80/81 to FY 04/05

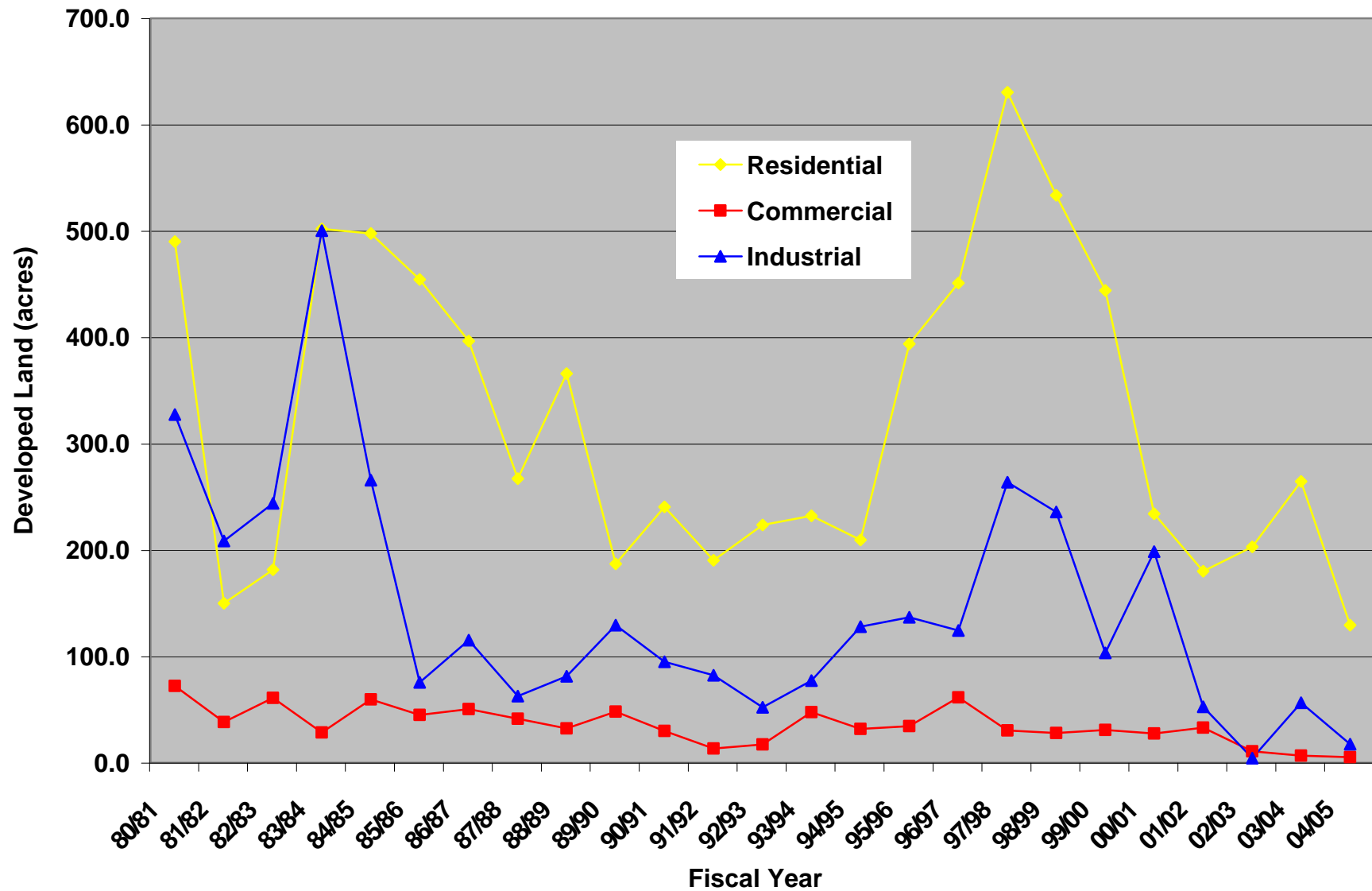


Table 2
Vacant Land Absorption (in acres) by Land Use and Planning Area:
Fiscal Year 04/05

Planning Area	Residential			Non-Residential			Total
	Single-Family	Multi-Family	Subtotal	Commercial	Industrial	Subtotal	
Almaden	16.6		16.6				16.6
Alum Rock	2.1	4.9	7.0	2.7		2.7	9.7
Alviso		0.5	0.5			0.0	0.5
Berryessa	2.1	3.8	5.9		12.4	12.4	18.4
Central	0.3	1.5	1.8	0.5		0.5	2.3
Edenvale	1.3	0.6	1.8		5.1	5.1	6.9
Evergreen	49.7	4.4	54.1	2.0		2.0	56.1
North		8.9	8.9				8.9
South		30.6	30.6				30.6
West Valley							
Willow Glen	1.7	0.5	2.3				2.3
Total	73.7	55.8	129.5	5.2	17.5	22.7	152.3

Figure 2
Vacant Land Absorption by Land Use:
Fiscal Year 04/05

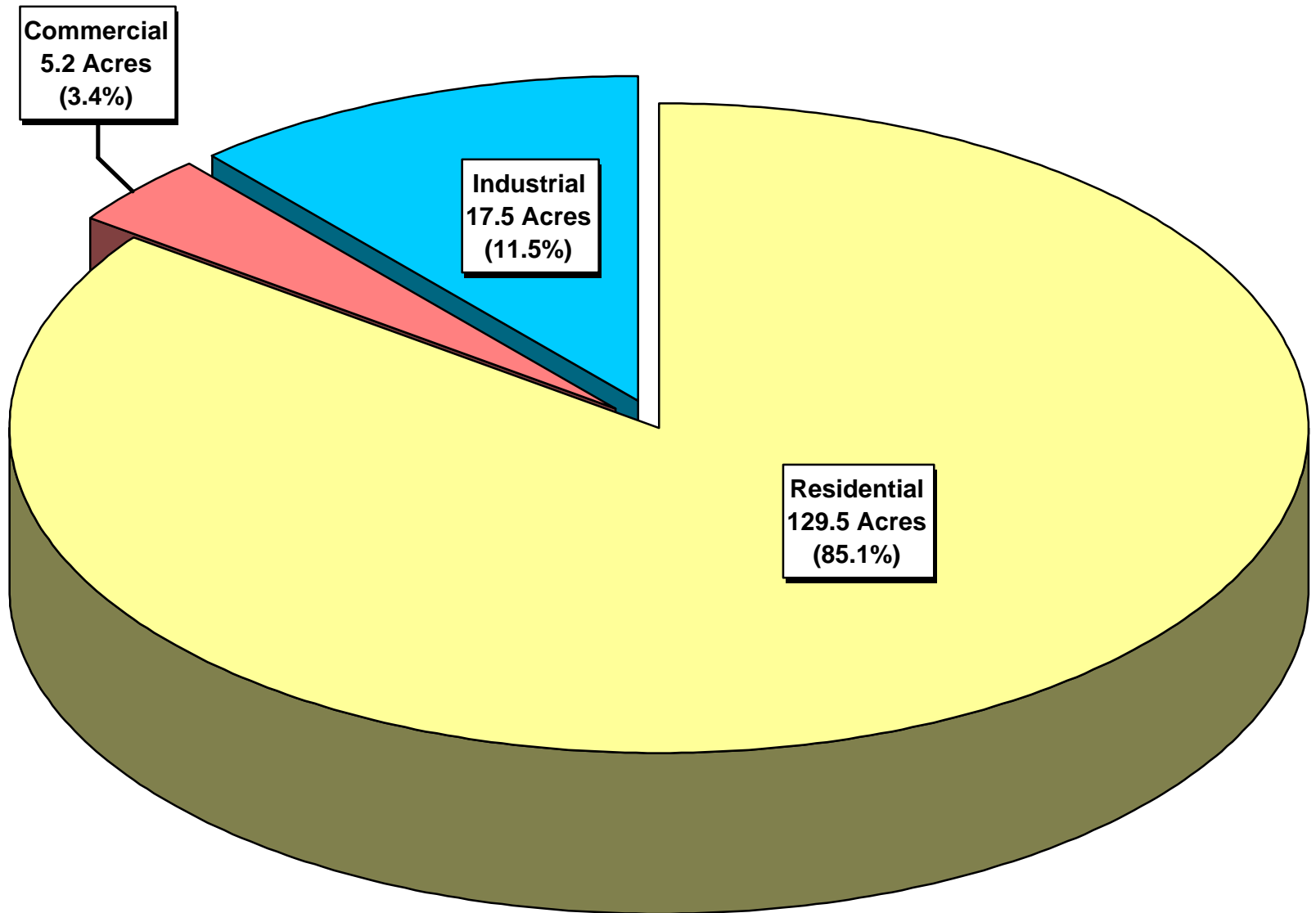


Table 3
Vacant Land Supply (in acres) by Land Use and Planning Area:
As of Fiscal Year 04/05

Planning Area	Residential			Non-Residential				Total
	Single-Family	Multi-Family	Subtotal	Commercial	Industrial	Other	Subtotal	
Almaden	122.2	0.8	122.9					122.9
Alum Rock	133.1	46.0	179.1	16.4	6.3	38.6	61.4	240.5
Alviso		14.9	14.9	6.9	346.0	544.6	897.4	912.3
Berryessa	167.9	69.1	237.0		56.7	20.0	76.7	313.7
Cambrian/Pioneer	7.3	20.9	28.1	46.2		2.5	48.7	76.8
Central	6.6	36.5	43.1	14.0	50.8	7.1	71.9	115.0
Coyote					1,327.9		1,327.9	1,327.9
Edenvale	72.8	40.1	112.9	14.1	423.1	1.7	438.9	551.8
Evergreen	130.7	3.5	134.3	30.1	375.5	63.7	469.2	603.5
North	5.4	34.8	40.2	6.7	332.5	56.0	395.2	435.4
South	42.3	105.8	148.1	4.6	104.7	23.0	132.3	280.3
West Valley	2.4	6.4	8.8	4.0		0.8	4.8	13.6
Willow Glen	12.0	9.0	20.9	3.9		5.7	9.6	30.6
Total	702.7	387.5	1,090.2	146.9	3,023.4	763.7	3,934.0	5,024.2

Figure 3
Vacant Land Supply by Land Use:
As of Fiscal Year 04/05

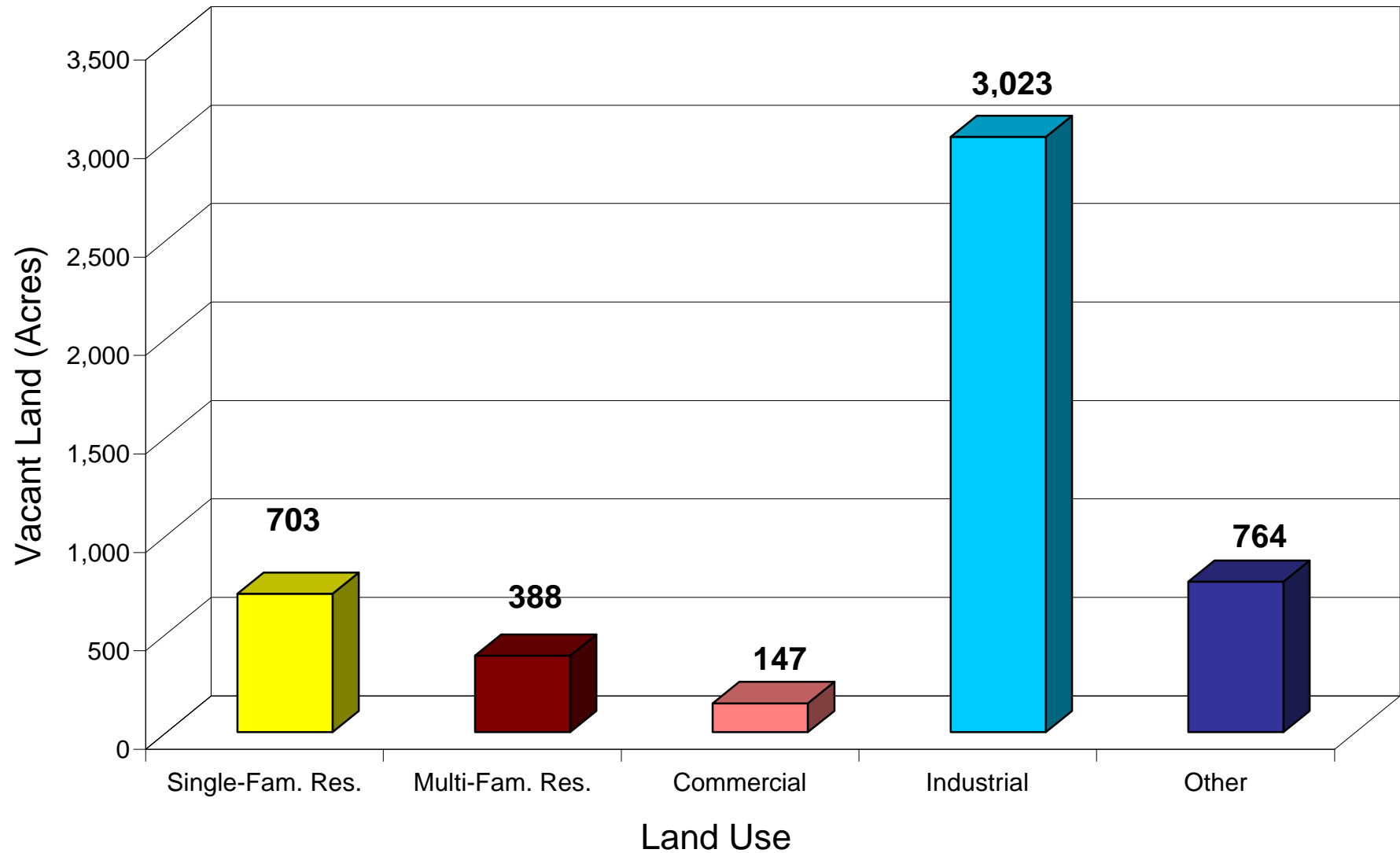


Table 4
Vacant Residential Land Supply (in acres)
by General Plan Designation and Planning Area:
As of Fiscal Year 04/05

Planning Area	Residential General Plan Designation												Total
	UH* (0.2 DU/A)	RR* (0.2 DU/A)	ER* (1.0 DU/A)	VLDR* (2 DU/A)	VLDR* (3 DU/A)	LDR* (5.0 DU/A)	MLDR* (8.0 DU/A)	MDR* (8-16 DU/A)	MHDR* (12-25 DU/A)	HDR* 25-50 DU/A)	TCR* (20-55 DU/A)	RS-C* (25+ DU/A)	
Almaden			2.8	85.5		33.0	0.9		0.8				122.9
Alum Rock	69.2			18.4		8.0	37.5	10.2	6.5	9.2	20.2		179.1
Alviso								14.9					14.9
Berryessa	126.1			27.2		5.0	9.6	11.6	1.2		56.4		237.0
Cambrian/Pioneer							7.3	2.0	7.2	11.7			28.1
Central							6.6	10.5	12.1	4.6	3.8	5.4	43.1
Coyote													0.0
Edenvale				17.3		25.0	30.5	26.0	1.3	12.7			112.9
Evergreen		7.4	19.9	13.5	4.2	31.0	54.9	3.5					134.3
North							5.4				34.8		40.2
South			33.2				9.1	11.8	0.6	90.1	3.4		148.1
West Valley							2.4	0.4	5.2		0.8		8.8
Willow Glen				1.2		0.8	10.0	1.4	3.4	4.2			20.9
Total	195.3	7.4	55.9	163.0	4.2	102.8	174.2	92.3	38.1	132.5	119.3	5.4	1,090.2

*UH=Urban Hillside, RR= Rural Residential; ER= Estate Residential; VLDR= Very Low Density Residential;
LDR= Low Density Residential; MLDR= Medium Low Density Residential; MDR= Medium Density Residential;
MHDR= Medium High Density Residential; HDR= High Density Residential; TCR= Transit Corridor Residential;
RS-C= Residential Support for the Core Area;

Note: DU/A = Dwelling units per acre.

Figure 4
Vacant Residential Land Supply by
Planning Area:
As of Fiscal Year 04/05

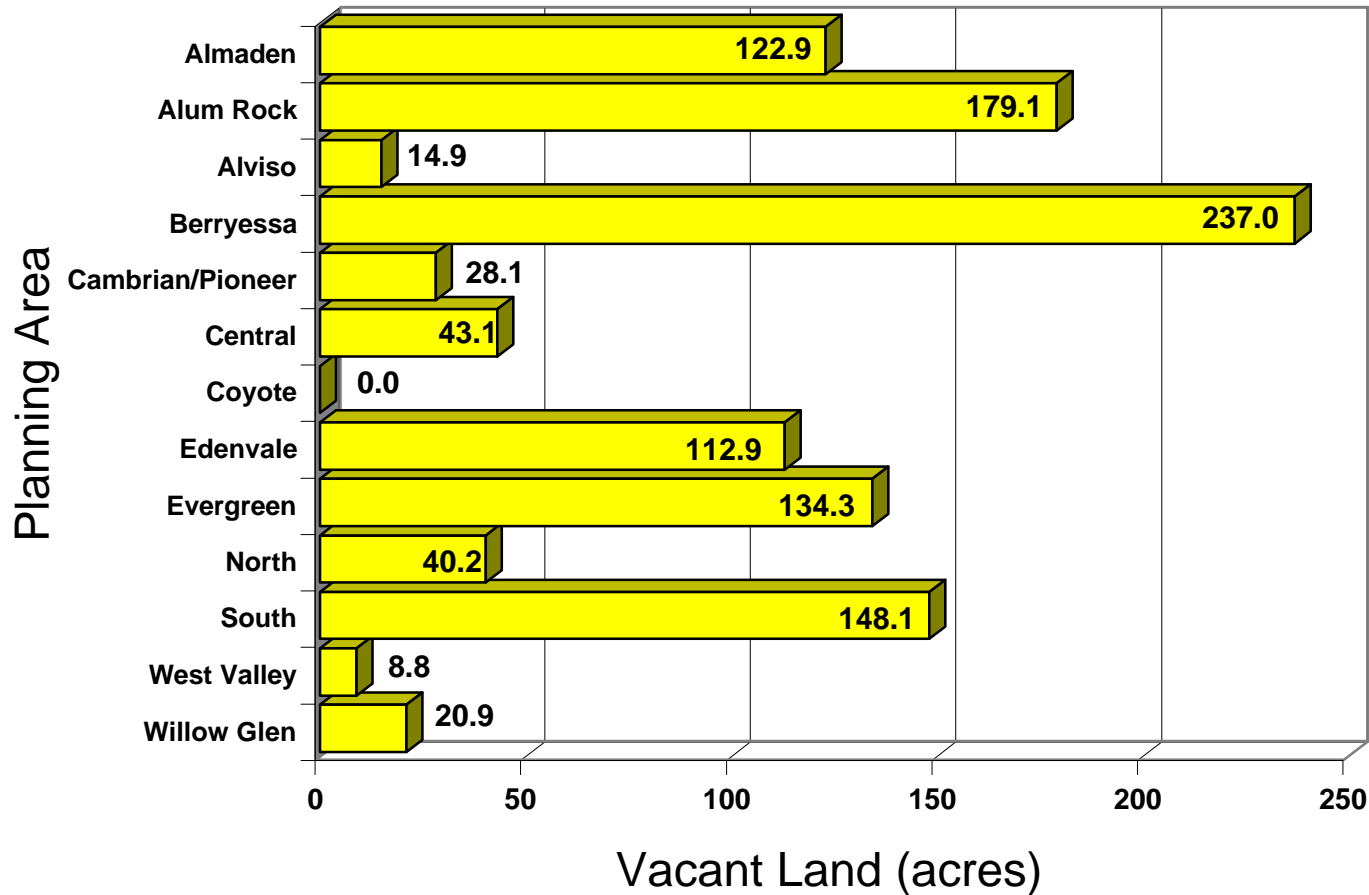


Table 5
Vacant Commercial Land Supply (in acres)
by General Plan Designation and Planning Area:
As of Fiscal Year 04/05

Planning Area	Commercial General Plan Designation							Total
	Office	Neighborhood Community Commercial	General Commercial	Regional Commercial	Core Area	River Commercial	Combined Residential/ Commercial	
Almaden								
Alum Rock		10.3	6.2					16.4
Alviso			0.2			6.7		6.9
Berryessa								
Cambrian/Pioneer	2.9		43.3					46.2
Central	5.5	1.8	4.6		2.1		0.2	14.0
Coyote								
Edenvale	4.3		9.8					14.1
Evergreen	11.1	5.6	12.4	1.0				30.1
North			6.7					6.7
South	0.7	3.9						4.6
West Valley	0.7		2.7				0.7	4.0
Willow Glen	2.2		1.7					3.9
Total	27.4	21.5	87.5	1.0	2.1	6.7	0.8	146.9

Figure 5
Vacant Commercial Land Supply by Planning Area:
As of Fiscal Year 04/05

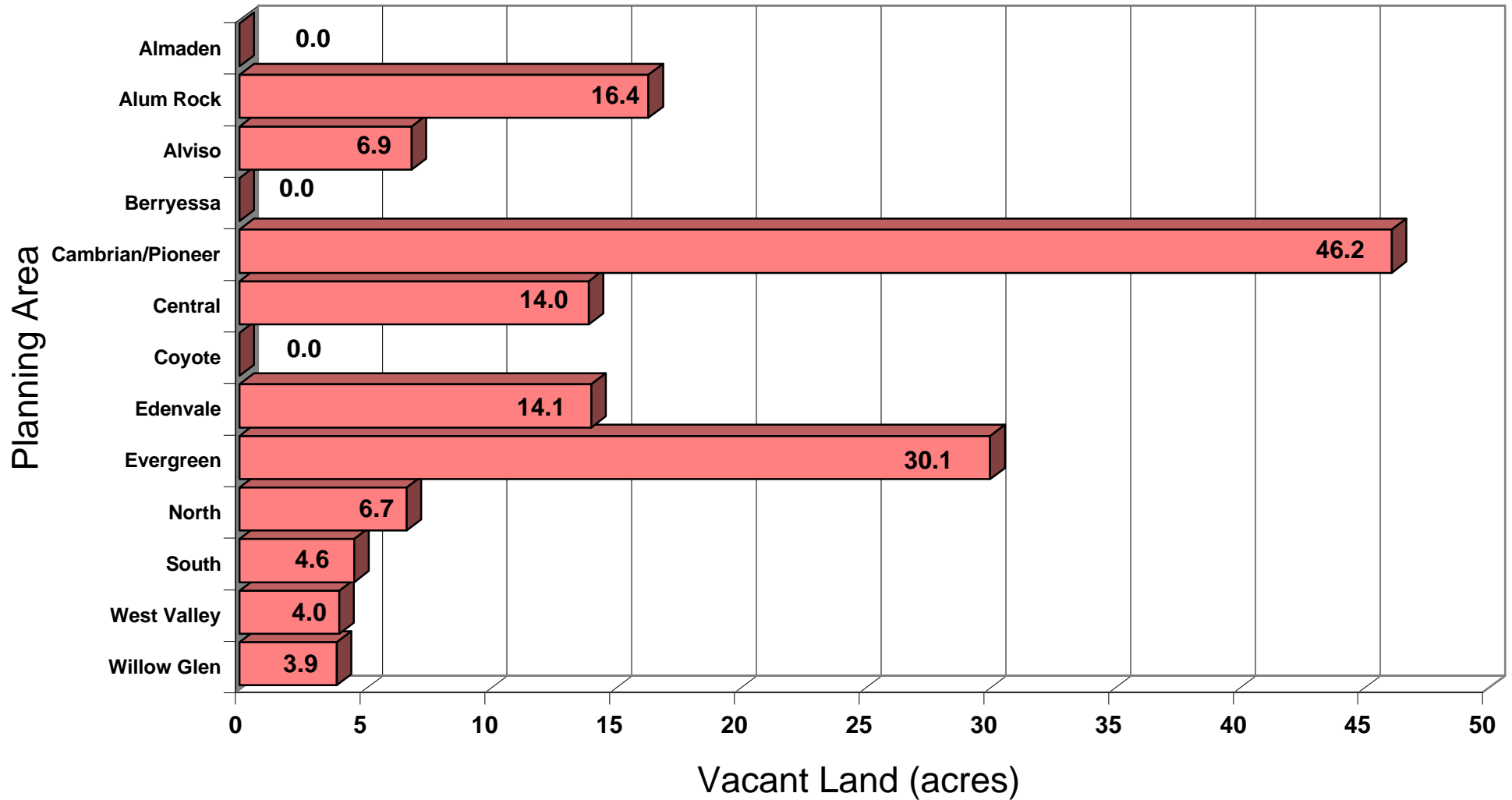
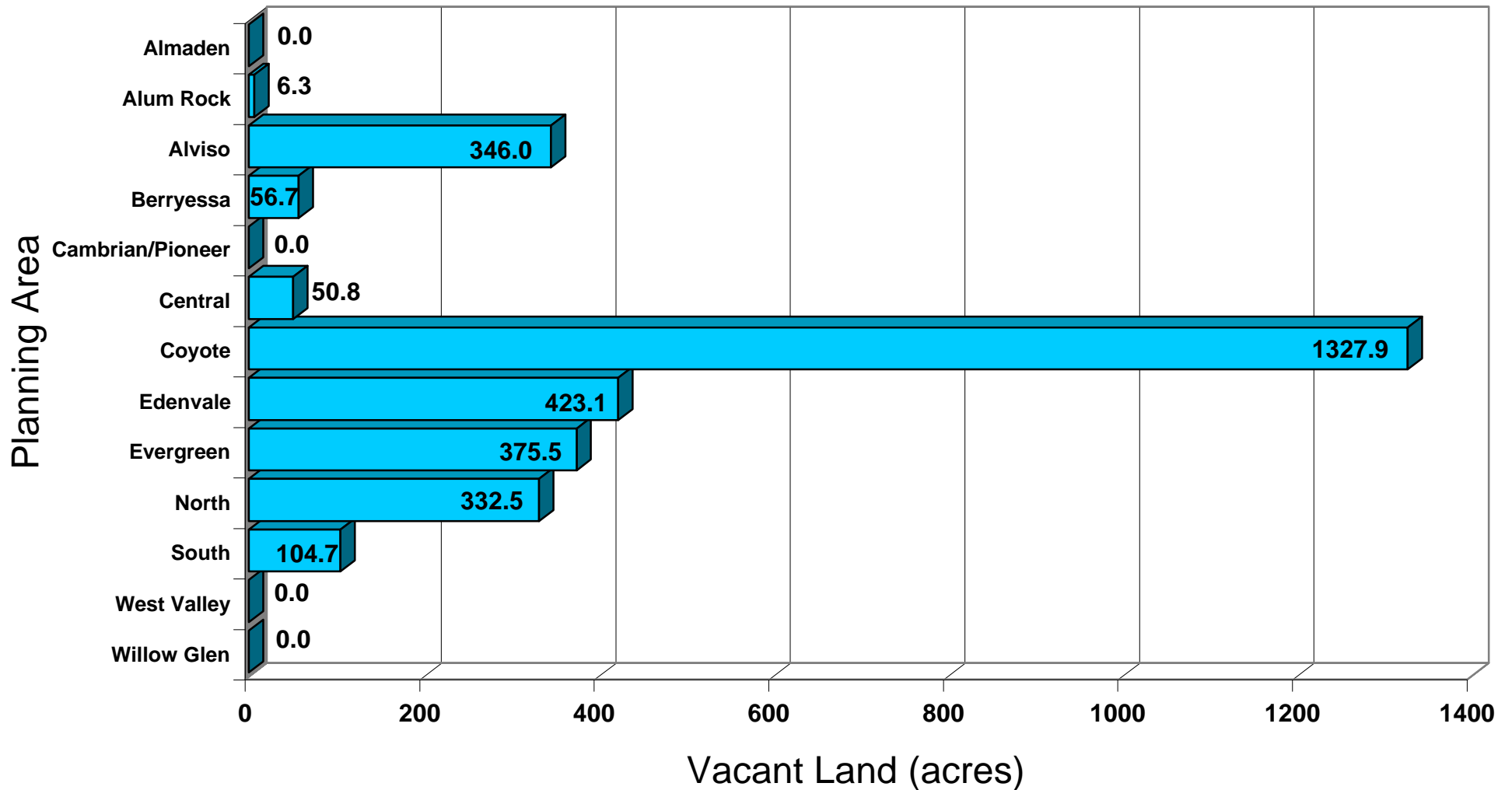


Table 6
Vacant Industrial Land Supply (in acres)
by General Plan Designation and Planning Area:
As of Fiscal Year 04/05

Planning Area	Industrial General Plan Designation						Total
	Industrial/ Commercial	Campus Industrial	Industrial Park	Industrial Core Area	Light Industrial	Heavy Industrial	
Almaden							
Alum Rock					6.3		6.3
Alviso	110.7		92.6		142.7		346.0
Berryessa	10.7		32.9		2.9	10.3	56.7
Cambrian/Pioneer							
Central	15.6		1.7		26.5	7.0	50.8
Coyote		1,327.9					1,327.9
Edenvale			416.1		7.0		423.1
Evergreen		331.2	36.8		7.5		375.5
North	3.3		248.4	76.5		4.4	332.5
South	5.3		66.9		15.2	17.2	104.7
West Valley							
Willow Glen							
Total	145.5	1,659.0	895.3	76.5	208.2	38.9	3,023.4

Figure 6
Vacant Industrial Land Supply by Planning Area:
As of Fiscal Year 04/05



City of San Jose

Vacant Land Inventory, July 2005

Methodology and Limitations

This Vacant Land Inventory was prepared through interpretation of aerial photographs taken of the City of San Jose on July 14, 2005. Vacant land areas were identified from these photos and subsequently entered into a Geographic Information Systems (GIS) database. While the information contained herein is believed accurate, errors may occur due to source limitations and the data translation process. The relatively small scale (1 inch = 12,000 feet) of the aerial photos limits thorough land use identification, especially due to tree cover and other obstructions.

Where aerial photos indicate the presence of new improvements on vacant lands, these areas are considered developed if building foundations or structures are observed. The inventory does not monitor the redevelopment of lands with prior improvements or measure the intensity of improvements or their occupancy (i.e., vacancy rate of buildings).

The inventory generally includes only those lands identified on the San Jose 2020 General Plan that are within the Urban Service Area (USA) and which are designated for urban development. However, no representation is made or implied as to the suitability or availability of these lands for development. Some vacant lands may have approved development entitlements.

The General Plan is amended as many as four times a year. Therefore, land area may be added or subtracted from identified General Plan land use categories as a result of approval of these amendments.

Some of the vacant lands designated as Public/Quasi-Public on the accompanying Vacant Land Inventory map may not be suitable for urban development or may be intended for permanent open space uses (e.g., buffer lands surrounding the Water Pollution Control Plant in the Alviso planning area).

Parcel lines represented on the accompanying map are for illustrative purposes only. Vacant land areas identified commonly extend beyond the boundaries of a parcel or parcels. For tracking purposes, only one Assessor's Parcel Number (APN) is used to identify each vacant land area.